

**AGRICULTURAL
FOREIGN
DIRECT INVESTMENT**

**IN
ZAMBIA**

刘海方 刘均 主编

OPPORTUNITIES AND CHALLENGES FOR
POVERTY REDUCTION AND
DEVELOPMENT



赞比亚农业 外国直接投资

(中英双语版)

减贫和发展的机会与挑战

海外借

**AGRICULTURAL
FOREIGN
DIRECT INVESTMENT**

IN

Z **MBI**

OPPORTUNITIES AND CHALLENGES FOR
POVERTY REDUCTION AND
DEVELOPMENT

刘海方 刘均 主编

**赞比亚农业
外国直接投资**

(中英双语版)

减贫和发展的机会与挑战

 社会科学文献出版社
SOCIAL SCIENCES ACADEMIC PRESS (CHINA)

图书在版编目(CIP)数据

赞比亚农业外国直接投资：减贫和发展的机会与挑战 / 刘海方，刘均主编. -- 北京：社会科学文献出版社，2017.4

ISBN 978 - 7 - 5097 - 9820 - 1

I. ①赞… II. ①刘… ②刘… III. ①农业投资 - 外商直接投资 - 研究 - 赞比亚 IV. ①F347.35

中国版本图书馆 CIP 数据核字 (2016) 第 245719 号

赞比亚农业外国直接投资

——减贫和发展的机会与挑战

主 编 / 刘海方 刘 均

出 版 人 / 谢寿光

项目统筹 / 高明秀

责任编辑 / 王晓卿 何晋东

出 版 / 社会科学文献出版社·当代世界出版分社(010) 59367004

地址：北京市北三环中路甲 29 号院华龙大厦 邮编：100029

网址：www.ssap.com.cn

发 行 / 市场营销中心(010) 59367081 59367018

印 装 / 北京季蜂印刷有限公司

规 格 / 开 本：787mm × 1092mm 1/16

印 张：17.75 字 数：273 千字

版 次 / 2017 年 4 月第 1 版 2017 年 4 月第 1 次印刷

书 号 / ISBN 978 - 7 - 5097 - 9820 - 1

定 价 / 79.00 元

本书如有印装质量问题，请与读者服务中心(010-59367028)联系

 版权所有 翻印必究



樂施會
OXFAM
Hong Kong

無窮世界
World
Without
Poverty

本书获得乐施会资助，内容不代表乐施会立场

前 言

在许多发展中国家,大多数最贫困的人群生活在农村地区,并以务农来维持生计。在这些国家的农业领域进行投资,可以提供显著的发展和消除贫困的机会。因此,在发展中国家和地区的政策制定者的议题中,农业投资与减贫是一个普遍性的话题。

不可否认,在全球的外商投资中,对农业领域的投资不到各行业总投资的百分之一。大多数农业国际投资的流向是发展中国家。此外,一些人认为,针对发展中国家的农业领域的外商投资将会增加,推动这一趋势的力量包括新兴经济体不断增长的粮食和肉类消费需求,生物燃料使用的增长,实现能源安全的努力,其他国家对自然资源的消耗(尤其是土地和水资源),浮动的食品价格以及农产品投机。

作为一个致力于消除贫困的组织,乐施会关注那些依赖农业为生的人们的生活状况与生计水平,并特别关注投资对此带来的潜在变革性影响。通过我们的合作伙伴的努力,我们已经看到,外来投资能够对农业发展与减贫发挥积极作用,并且为贫困的农民和当地社区带来一系列好处,包括收入增加、技术转让、生产力提高、市场准入权利和就业机会的增加。然而,经验也证明了这样的投资裹挟着风险,包括强制拆迁、夺取当地社区的土地、加剧基于土地和水资源的冲突、扭曲常规的土地所有权制度、加剧当地治理问题的复杂程度、缩小以小农为本的农业政策制定空间,以及迫使市场趋向于追逐集中式一体化的农业企业的利益和交易。

为了更好地了解农业领域的外来投资对贫困的影响,2012年,香港乐施会决定与其他乐施会分支机构和驻地办公室通力协作,支持一系列针对在许多亚

非发展中国家的投资的研究。本书包括该系列的两个关于赞比亚的研究报告，赞比亚有超过一半的人口以农业为生。

在本书的第一部分，伦敦大学亚非学院的 Jessica Chu 博士对赞比亚的农业外来直接投资的主要趋势和政策进行了概述。在第二部分，孟买大学的 Aparajita Biswas 教授以印度在赞比亚的农业投资为重点，研究了其性质和可持续性。研究过程中，两位作者都进行了广泛的文献综述、利益相关者分析和权力分析。他们还进行了实地考察，在非洲研究专家，如北京大学的刘海方教授和贾瓦哈拉尔·尼赫鲁大学的 Ajay Dubey 教授，以及来自印度、南非、英国和赞比亚的乐施会工作人员的支持下，采访了广泛的利益相关者，包括政府官员、投资公司、学者和非政府组织。

我们希望本书提出的分析和建议能够促进对关于农业外来投资是不是赞比亚等发展中国家消除贫困和经济发展的动力的深入思考和讨论，并促成有力的政策改善和持续行动，使这些投资成为使人们摆脱贫困的有效动力。

乐施会感谢所有为在赞比亚的研究贡献专业知识的合作伙伴和工作人员。我们特别感谢刘海方教授的支持，是她使这本书的中英文版得以在中国出版。

梅家永

项目和研究经理

乐施会，北京

2016年12月

FOREWORD

In many developing countries, the majority of the poorest people live in rural areas, and depend on agriculture for their livelihoods. In this regard, investment in the agricultural sector of these countries can present significant opportunities for development and poverty eradication. As such, it is a common element in the discussions and discourse of policy makers in the developing world.

Admittedly, the global foreign investment which goes to the sector of agriculture is less than one percent of the total investment in all sectors. Most of this international investment in agriculture, however, is going to developing countries. Additionally, some contend that such foreign investment in developing countries' agricultural sector will increase, with the forces driving that trend including a growing demand for food and meat from emerging economies, increases in bio – fuel initiatives, efforts to meet energy security needs, depletion of natural resources (especially land and water) in other countries, volatile food prices, and agricultural commodity speculation.

As an organisation dedicated to combating poverty, Oxfam Hong Kong is particularly concerned about the potentially transformative impacts of investment on the lives and livelihoods of people tied to and dependent upon the agricultural sector. Through the work of our partner organisations, we have seen that foreign investment could play a positive role in agricultural development and poverty reduction and bring a range of benefits to poor farmers and local communities, including earnings increases, technology transfer, higher productivity, market access and job creation. However, experience has also shown that such investment carries the risk of forced evic-

tions, depriving local communities of their land, increasing conflicts over land and water, distorting customary land tenure systems, compounding local governance issues, reducing the policy space for peasant – oriented agricultural policies and distorting markets towards increasingly concentrated agribusiness interests and trade.

To better understand the poverty impacts of foreign investment in agriculture, Oxfam Hong Kong decided to support a series of research on the investment in a number of developing countries both in Asia and Africa in 2012, in collaboration with other Oxfam affiliates and country teams. This book contains the two research reports of the series about Zambia, where its agricultural sector provides livelihoods to more than half of the population.

In the first part of the book, Dr. Jessica Chu of the School of Oriental and African Studies of the University of London provides an overview of the key trends and policies in the agricultural foreign direct investment in Zambia. In the second part, Professor Aparajita Biswas of the University of Mumbai focuses on the Indian agricultural investment in Zambia and examines its nature and sustainability. To undertake the research, both authors conducted extensive literature review, stakeholders mapping and power analysis. They also made field visits, interviewing a wide range of stakeholders including government officials, investing companies, academics and NGOs, with the support of Africa's experts such as Professor Haifang Liu of the Peking University, and Professor Ajay Dubey of the Jawaharlal Nehru University, as well as Oxfam staff from India, South Africa, the United Kingdom and Zambia.

We hope that the analysis and recommendations presented here will foster thoughtful debate and discussion about the role of agricultural foreign investment as a vehicle for poverty eradication and economic development in developing countries, especially in Zambia, and also lead to strong policies and sustained actions which make the investment an effective force in lifting people out of poverty and deprivation.

Oxfam Hong Kong thanks all partners and staff who contributed their expertise to the research in Zambia. We also extend very special thanks to the support of Profes-

sor Haifang Liu, who made possible the publication of the book in China and also in both English and Chinese.

Kevin May
Programme and Research Manager
Oxfam Hong Kong, Beijing
December 2016

导言

四国学者在赞比亚实验非洲中心主义的 调查研究

2006年初《中国对非政策白皮书》的发表、当年11月中非峰会以空前的规格和热情氛围隆重举行,让中非关系瞬间成为当代国际关系中最为热门的话题。然而随着中非合作在各个领域的风生水起,种种明显带有偏见、臆测成分的说法开始甚嚣尘上,比如有关中国公司利用双边良好政治关系在非洲进行大规模圈地的说法。与此同时,随着印度紧跟中国,大量增加了在非洲的合作实践,关于印度的圈地传言在国际舆论界也增加起来,只是远没有针对中国的那么剧烈。

向来以扶危救困、匡扶社会公平正义为己任的香港乐施会,在此前后也开始关注中非关系的话题,而且秉承从民众中来的传统,积极在社会大众层面探讨中非关系的影响,并且以“发现优秀实践案例并积极推广”为弧的。这与北大非洲研究中心所秉承的坚持客观研究并积极进入一线以寻找可以用于启发、引导的正能量来逐渐克服中非关系中的粗糙性的宗旨不谋而合。2012年,笔者开始了第一次与香港乐施会在非洲问题上的合作,第一个任务是与学生一起,翻译出版了在赞比亚的乐施会支持的调研报告《赞比亚农业发展及其对小农生计的影响》(社会科学文献出版社,2013)。借由报告中翔实的关于赞比亚农业管理框架的分析,很多即将或者已经开启了在赞比亚投资的中国企业获益,它们反馈说,这本书非常及时地为它们的决策提供了指南。中国援助赞比亚农业示范中心的包主任也发来信件,诚恳地肯定我们的工作并且认为报告有利于他们

思考下一步示范中心的走向。

受到鼓舞,加上考虑到赞比亚吸引的包括中国投资者在内的各国投资者已经数目可观,由梅家永协调的来自乐施会国际联合会多个成员的同事和北大的团队开始探讨把赞比亚作为非洲国家的一个典型案例,详细研究中国农业合作者与以往合作者的异同之处,特别是从非洲人受益的这个角度,从而回应国际上有关中国在非洲大量“圈地”等的舆论,试图通过实证性的研究,来证实或者证伪这些论调。经过多轮方法论研讨和周密的文案准备工作,由梅家永先生、我和研究生宛如组成的调研小组于2013年8月末出发去赞比亚。之前,家永通过乐施会国际联合会其他成员已经协商组成了南非调研小组、印度调研小组和英国小组,此时也都分别到达。整个“多国部队”的组成既有来自各国的多年从事非洲研究的同行,也有乐施会国际联合会成员驻这些国家的代表。更难得的是,乐施会在赞比亚的团队提供了办公室,联系了赞比亚方面的种种机构供我们采访调研。

研究非洲的各国同行,本来就有格外的共同的“非洲情结”,将非洲的减贫和可持续发展作为衡量的标准,是不言自明的共识。这是典型的非洲中心(Afro-centrism)的视角,即无论哪个国家来合作,都不要自说自话、自我宣传,而是从长时段的非洲发展的历史纵深来看非洲的特殊性,理解其结构性制约、当下的需要和面临的挑战;从方法论上,我们希望通过将纵向的非洲发展和横向的各国以援助、贸易和投资方式与非洲合作的种种实践作为时代大背景,将受到争议的包括中国在内的新兴经济体的对非合作放置在这个大背景上来分析其成败得失,既给予更开阔视角的理解,同时力图客观公允地进行分析,用更加开放的眼光看待在新兴经济体的带动下新一轮对非合作的国际竞争与热潮。

两个多星期的时间里,十几个人共同住在一个小客栈,每天早饭时间交流各自前一天的发现心得,然后各自去调研自己国家的农业投资者;部分时间是大部队集体去赞比亚发展署等部门访谈,大家就在车上继续交流。跟这么多同行一起做实地调查,这在我近二十年的非洲研究中尚属首次,收获大,发现多,且因为要与其他团队不断交流调研方法在实操层面的可行性,探讨出来可能的新路径,非要进行“深入肌理”的交流切磋不可——对于大多数习惯于孤独个体

式工作方式的研究者来说绝对是一次打破常规的新鲜经历。相信对每一个队员,这次考察从方法论和工作方式上的创新都是前所未有的;此后是否还有幸因为梅家永带领的乐施会团队的创新精神而促成、凝聚成类似的团队进行集体调研还未可知。我相信,这次经历会让我们中的每个人都会在若干年的时光里慢慢品味那个开着金合欢和蓝樱花的院落,那晚风中的散步,那一个又一个正式和非正式的工作坊,那些工作坊里面说出来和没说出来的许许多多设想和尝试。

伦敦大学亚非学院的朱倩文博士候选人原本就在赞比亚调研,她成为英国团队的主要调研者,而且她也愿意承担整体上将赞比亚的团队调研成果写成一个总报告的任务。中方团队的宛如女士(现在已经毕业,在迪拜从事国际金融工作)承担了报告的翻译工作;印度团队中孟买大学的 Aparajita Biswas 教授和贾瓦哈拉尔·尼赫鲁大学的 Ajay Dubey 教授共同完成了印度在赞比亚农业投资的分报告,硕士生马婕同学完成了该报告的中文翻译工作。我的博士生刘均和我分别承担了中英文报告的编辑、文字加工及校对工作。不能不提的是,香港乐施会的梅家永先生、贾丽杰女士、李梦瑶女士和蔡睿女士先后在推动调研小组的报告撰写和沟通方面发挥了巨大的作用。没有乐施会的同事,没有他们的执着理念和接地气的工作方式的感召,这次调研和调研的成果,都是很难想象的。最后也要特别感谢社科文献出版社高明秀女士的持续督促和对我们的宽容,让这本书得见天日。

中国在赞比亚投资的案例,我们收录在随后的一本论文集里,也即将付梓,欢迎读者继续关注北大非洲研究中心陆续推出的农业研究相关成果。

刘海方

北京大学非洲研究中心

2016年12月

Introduction: Four countries' scholars trying Afro – centric Methodology in Zambia together

The publication of the Whitepaper of China's African Policy in January 2006, and the successful convention of the first China – Africa Summit in Beijing in November with the unprecedented scale in term of the participation and its special enthusiastic atmosphere, have stimulated the close watch to China – Africa relation since then, and it probably have become one of the most popular topics in the whole International relation arena. However, while the cooperation unfolding in more and more directions, lots of misunderstandings and misperceptions also have emerged towards China's intentions in Africa, such as the speculations on China's land grab in Africa. Likewise, as India also geared her diplomacy towards Africa since 2003, and myths on India's presence in Africa also have ascended.

Oxfam Hong Kong(OHK), with its consistent vision of empowering people to create a future that is secure, just, and free from poverty, started to pay attention to the emerging markets' new cooperation with Africa at this point, especially China's engagement; and what makes it different has been the “bottom – up” approach as usual to look at the positive impacts on the disadvantaged people, and to disseminate among the policy level these “good practices” collected from the grass – root level. This approach obviously is very much shared by Peking University Centre for African Studies (PKUCAS), as we also have been insisting on reflecting current China – African Relations based on our first – hand resource collected on the ground and solid objective findings with concrete inspirations and guidance on how to push China – African cooperation further while conquering the roughness in the beginning. The col-

laboration between OHK and PKUCAS started in 2012 from a small project to translate a report already commissioned by Oxfam in Zambia, namely *Assessment of the Status of the Zambia's Agriculture Sector Development Framework and Its Impacts and Contribution to Improvement of Small Scale Producers' Livelihoods*. After publishing both the English and Chinese versions into a book's form in 2014, we received lots of very positive feedbacks from different stakeholders, such as Chinese farms that are planning or have done investment in Zambia, or Mr. Bao, the Director of Chinese Agricultural Demonstration Centre in Lusaka about the utility for him to understand better the way forward of the centre.

With all these encouragement, Oxfam colleagues, coordinated by Mr. Kevin Mei (Jiayong), and my team decided that we should push things further by carrying on deep research on both China and other Emerging powers' involvement in African agriculture sector given the importance of it for African long-term development. Due to what we had known about Zambia's good conditions of carrying on Agricultural development and its attractiveness to foreign direct investment, we decided to take Zambia as a pilot country. On one hand, we all as Chinese nationals had a pressure to respond to the discourse of China's land grab in the international media; on the other hand, we hope this empirical research could serve for a thorough understanding of the differences of players from China (and other emerging powers) and those from traditional powers.

After many rounds of discussions of methodologies within and without, our team, composed by Kevin, me myself and my MA student Wan Ru, started our field journey to Zambia in September of 2013. Thanks to Kevin's Oxfam colleagues based in different countries, scholars from India, UK, South Africa also arrived to join us. And Oxfam country team in Zambia had been kindly arranging our accommodations, meetings with relevant organizations, etc. Africanists coming from different countries normally feel close as we all share an "Africa Complex" which may not be understood by experts of other geo-areas. To take poverty alleviation and sustainable de-

velopment as benchmark is easily a common ground for us and it always goes without saying. This is an obvious Afro-centrism and we agreed among our team members that instead of looking at any particular country's intervention in Zambia's agriculture which might end up in trapping ourselves in boasting this or that country's modality, we would like to look in depth at a group of countries in comparative perspective, and at Zambia's own long-term development to understand its structural problems, its own needs as well as the challenges ahead. Methodologically, this is to provide both a horizontal axis of African own development and a vertical axis of external involvements to understand the three-dimensional space that Chinese and other emerging players are entering. With this panorama picture we will be able to reach a reasonable evaluation of these new players' approach as well as their contribution, and also a balanced understanding on the new international competition on Africa stimulated by new Emerging markets.

In two weeks' time, members of this "multinational force" lived together in a cozy guesthouse in beautiful Lusaka, using breakfast time to recap the previous day's job and discuss and provoke one another. After this gathering together time, we would take our wheels again to visit more farms from our respective four countries. Otherwise, we would all join Oxfam colleagues to visit stakeholders of Zambia, such as Zambia Development Agency; then it would be time for us to share beautiful scenery as well as the time of chatting together. Personally, I never ever had experience like this to conduct field work with a group of colleagues in Africa, and neither thereafter. It is so unique not only because of the collective but also separate investigation experience, but also the way we carried the job together in a shared temporal as well as geographic space, and methodologically we developed this common approach which requested dialogue "as deep as skin texture" among us and constant reflections on possibilities or impossibilities. For any scholar used to the normal "individually solitary approach", this made a very different experience, which might be not possible if it was not supported by Oxfam with staff members locating different parts

of the world and its members helped to identify a group of international colleagues to work together, which was so innovative in term of methods and manners of working. It is also hard to imagine the possibility without Kevin, as coordinator of all different staff members of Oxfam bringing people from four countries and worked so harmoniously and complementarily for two weeks. I also believe for certain that in future all of us would always remember the yard of the guesthouse brimming with fragrance of blue jacaranda and silk trees, together with the beautiful memories of those many formal and informal workshops we had inside and spoken and unspoken ideas and imaginations for African development purpose……

Jessica Chu, candidate of SOAS, London University, back to the time of this research kindly took the job to write the general report on behalf of all the team members; Ms. Wan Ru, helped to translate the English version into Chinese. Prof. Aparajitao Biswas and her colleague Prof. Ajay Dubey from India offered the country case report based on field work carried, and Ms. Ma Jie helped with this part to be translated into Chinese. I, assisted by Mr. Liu Jun, took the liberty to compile the two great reports into one book's form with all the editing, proof-reading and refining work. I have to properly mention some great names that have contributed to the publication of this book finally, Ms. Jia Lijie, Ms. Li Mengyao, Ms. Cai Rui, Kevin from OHK. Without all of your generous help, this is not possible, and specifically, it is your idealist working manner that has constantly pushed us forward to work for people on the ground. Last but not the least, Ms. Gao Mingxiu, from the Social Sciences Academic Press, has been so encouraging and so tolerant to our delay and finally make this book come out.

We decide that we put our findings on China's investment in Zambia in another book that we are editing and hopefully it will also come out soon. Thank you in advance for your critical feedback.

Liu Haifang

目 录

前言	梅家永	1
导言 四国学者在赞比亚实验非洲中心主义的调查研究	刘海方	1
报告一 赞比亚农业外国直接投资：减贫和发展的机会与挑战 ——趋势与政策概述	朱倩文	1
报告纲要		1
1 介绍		4
2 研究方法		6
2.1 数据		6
2.2 制约		8
3 赞比亚的发展和农业环境		10
3.1 赞比亚与发展		10
3.2 赞比亚农业概述		12
4 赞比亚的投资环境		17
4.1 赞比亚近期投资趋势		17
4.2 贸易和援助		19
4.3 投资政策和赞比亚发展署的作用		22
5 赞比亚农业投资概述		25